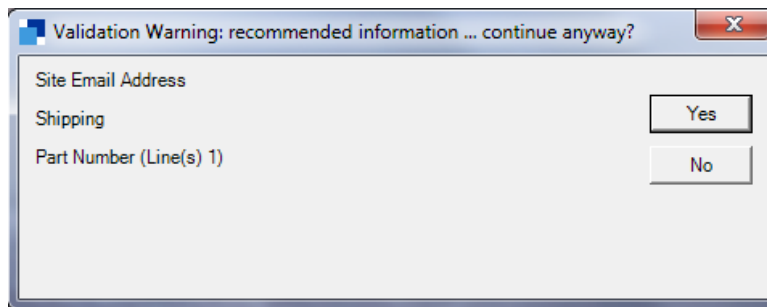


## Data Validation for QuoteWerks

This module runs invisibly in the background and ensures that the user has entered all required information at each stage in the Quote/Order/Invoice lifecycle. At key events ('Print Quote', 'Convert To Order', 'Print Order', 'Convert To Invoice', 'Print Invoice' or any change of status) the user will be notified that certain fields remain to be completed. The list of fields to be validated is administrator-configurable, can be set for each type of event and any field can be flagged as 'required' (in which case the user will be unable to continue the action unless the field contains data) or 'advisory' (in which case the user will be notified but given the choice of returning to fill in the field or continuing with the action). A typical use of this would be to prevent the user printing a quote until all 'Sold To' information was complete and the user had saved the document and a QuoteWerks Document Number had been allocated.



## User Activity Logging for QuoteWerks

This module runs invisibly in the background and allows you to record most of the actions taken by your users (log on/off to the system, open/create/save in new status/print document) to a log file on the server. This can be very useful for troubleshooting or for audit trail purposes. (In certain jurisdictions it may be a legal requirement for staff to be informed if this module is in operation).



## Authorisation request for QuoteWerks

This module runs invisibly in the background and operates with our email workflow application to trigger an authorisation request to higher management under certain situations (typically quote value higher than a certain level, profit margin lower than a certain level)

## eMail Workflow for QuoteWerks

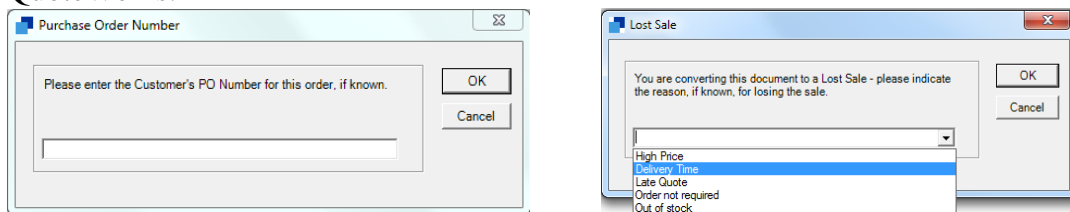
This module runs invisibly in the background and allows you to add workflow to QuoteWerks by sending notification emails at each stage in the Quote/Order/Invoice lifecycle. The notifications can be set to be sent at any of the following key events ('Print Quote', 'Convert To Order', 'Print Order', 'Convert To Invoice', 'Print Invoice' or any change of status). The message addressee, cc, bcc, subject and body contents are all configurable. Optionally, the mail can be set to trigger only if certain criteria are satisfied (eg order value greater than a certain level). A typical use of this would be to notify management and alert Order Processing staff to the arrival of a new Order.

## Filesystem Synchronisation for QuoteWerks

The QuoteWerks (Corporate Edition rehosted to SQL) one step synchronisation keeps your field staffs documents, product databases, bundles, required items, etc etc in sync with the Master Installation, but does not propagate changes to layouts (document templates), reports, images, literature, cover pages, spec sheets, site.ini, or any other similar files. This module runs automatically upon completion of a data sync and aligns all these other files, ensuring that your sales reps are using the up to date versions. Files to be synchronised can be specified by administrator, either by filename or as an entire QuoteWerks subdirectory to be kept in line.

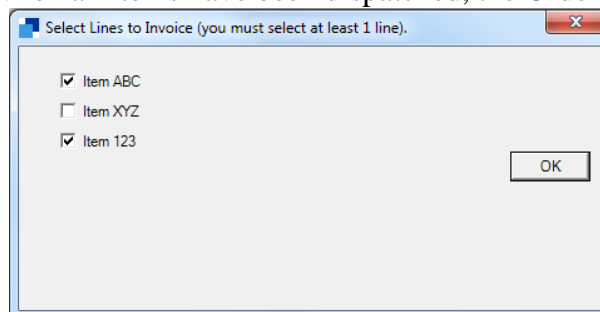
## Purchase Order / Lost Sales Reason prompt

When you 'Convert to Order' or 'Convert to Lost Sale', this module will prompt the user either for a customer PO number or a reason as to why the quote was not accepted. The user would then enter the information and our module will place the entry into the relevant field in QuoteWerks.



## Partial Invoicing for QuoteWerks

This module runs invisibly in the background and allows an Order to be Converted to an Invoice in stages, for the times when you dispatch an order in multiple parts with an invoice for each delivery. On Convert to Invoice, the user is presented with a list of order items and can select which ones to Deliver/Invoice. The Order remains open but the selected items are marked invoiced and an Invoice created for those items. Those items are then unavailable for invoice in subsequent dispatches. When all items have been dispatched, the Order is closed.



## **Link Documents for QuoteWerks (if prior to QuoteWerks version 4.5)**

This module, accessed from the QuoteWerks Tools menu, allows path and filenames of documents associated with the quote to be saved to the Internal Notes field. A typical use of this would be to link solution design documents to the relevant QuoteWerks order. A second Tools menu option allows these documents to be opened by the relevant Windows application by clicking on the link.

## **Copy Address**

For many QuoteWerks users, the 3 address fields will hold the same contact details. QuoteWerks requires you to click SoldTo, ShipTo and BillTo. Our module, that runs invisibly in the background will copy the contact details into all three addresses with just one click.

## **Update Date**

When you 'convert to order' and 'convert to invoice' the DocDate field is not updated. This module, that runs invisibly in the background, will update the date on the order/invoice to today's date.

## **Sort Document Items for QuoteWerks**

This module, accessed from the QuoteWerks Tools menu, sorts the document items and automatically creates headings and subtotals at each sort break. The sort fields (max 3 key sort) and sort order for each sort field are configurable. A typical use of this would be to have your quote show all hardware, followed by all software, followed by all services, displayed as 3 separate sections with headings and subtotals, regardless of the order in which those items had been selected by the sales rep.

## **3<sup>rd</sup> Party Commission for QuoteWerks**

The QuoteWerks sales commission is calculated for the logged on user as the Sales Rep. However, you may be paying commission to a 3<sup>rd</sup> party (a sales agent, or an introducer). This module allows this commission to show in the QuoteWerks sales commission field (and therefore correctly on all sales reports). At present this module only supports commission as a percentage of net quote value (SubTotal), but we would be prepared to extend it to calculate commission as a percentage of profit margin or as an absolute value if desired by a customer.

## **Advanced Excel Integration for QuoteWerks**

This module, accessed from the QuoteWerks Tools menu, allows complex existing Excel-based pricing models to be incorporated into your QuoteWerks system. A typical example of this would be where sales reps use an existing Excel spreadsheet as a Configurator to calculate the price of a job and where this Configurator needs to be retained. The user selects a Pricing Spreadsheet option from the Tools menu, which brings up the familiar spreadsheet *as a dialog box*. The user completes the spreadsheet exactly as normal, and on clicking OK to close the dialog box, information is transferred to QuoteWerks as document items. (The information to be transferred is different for each installed system, but we can move essentially any of the information from Excel to QuoteWerks.) As a backup, a copy of the whole spreadsheet as completed by the sales rep is saved to a subfolder within QuoteWerks with the QuoteWerks Document reference as its filename (eg. AAAQ1003.xls).

## Quintadena Estimator for QuoteWerks

This module allows you to have raw materials set up in your product database and to calculate the cost of building a bespoke item for your customer. For each material, you can choose whether to regard the price

- as a square meter / square foot price (in which case you enter length and width sizes and a quantity for the line item)
- as a linear meter / per foot price (in which case you enter length and quantity for the line item)
- as a per item price (in which case you simply enter the quantity for the line item)

You build your item in the Estimator and transfer it to QuoteWerks as a group. A typical use of the Estimator would be for pricing a job in a sign-writing or large format digital print environment where costs depend upon area to be printed. Units can be entered and calculated in Imperial or Metric (and automatically converted to the desired system if necessary). See Screenshot.

Item	Type	Quantity	Unit	Description
1	Group Header	15.00		Display signs 840mm x 1188mm for exterior use
2	Material	2.00		Foamboard 2 of 5mm Foamboard S/S, size 840mm W x 1188mm H
3	Material	1.00		2mm Card D/S, size 840mm W x 1188mm H
4	Linear	1.00		Aluminium Bar, size 840mm Width
5	Fixed	14.00		hours General Labour